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Italy

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Tree Nuts Annual 2016

Report Categories:

Tree Nuts

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Report Highlights:

Italy is the second largest EU-28 almond producer after Spain. Italy's MY (marketing year) 2016 almond production is forecast to remain steady at approximately 20,000 metric tons (MT). Pistachio is a traditional crop in Italy, especially in the Sicily region (Bronte area) which accounts for approximately 90 percent of total supply. Pistachio trees production is cyclical, bearing heavily in alternate years. Therefore, after the extraordinary MY 2015 campaign, MY 2016 will be a 'lower' bearing year. Italy lost its walnut market leadership a few decades ago and now is a leading importer, mainly from the United States. Italy's MY 2016 walnut production is preliminarily forecast to decrease to approximately 9,850 MT due to adverse weather. Quality is expected to be excellent and calibers good.

ITALY

I. ALMONDS

Table 1: Area (hectares) and Production (metric tons)

Almonds, Shelled Basis	2014	2015	2016
	Estimates 2014/2015	Estimates 2015/2016	Forecast 2016/2017
	Post Data	Post Data	Post Data
Area Planted	54,780	58,112	58,115
Area Harvested	54,172	57,425	57,428
Beginning stocks	1,000	1,000	1,000
Production	10,000	20,000	20,000
Ending stocks	1,000	1,000	1,000

Sources: Istat (National Institute of Statistics); Industry contacts.

PRODUCTION

Italy is the second largest EU-28 almond producer after Spain. Sicily and Puglia are the main almond-producing areas, accounting together for approximately 88 percent of total supply. *Tuono, Pizzuta d'Avola, Fascionello, Filippo Ceo, Fragiulio Grande, Genco, Falsa Barese, Ferragnés* are the leading varieties grown in the country. Italy's MY (marketing year) 2016 almond production is forecast to remain steady at approximately 20,000 metric tons (MT). Quality is not expected to be as good as last year due to the draught that affected the Italian peninsula beginning April 2016 until the end of summer.

CONSUMPTION

In-shell almonds are mainly sold for fresh consumption. Shelled almonds are milled and generally used as a raw material for confectionary and bakery food companies.

TRADE

In 2015, Italy imported 32,927 MT of almonds, mainly from the United States and Spain, accounting for 60 and 24 percent of total imports, respectively. In 2015, Italy exported 9,381 MT of almonds mainly to France, Germany, and the United States, accounting for 30, 22, and 15 percent of total exports, respectively.

Table 2: Italy's leading shelled almonds imports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	183,024,373	28,899	282,356,321	36,585	288,400,397	31,771
United States	T	102,394,861	16,880	172,474,363	23,781	170,639,807	19,002
Spain	T	53,324,393	7,480	56,839,217	5,717	72,712,900	7,619
Australia	T	10,537,557	1,980	27,564,594	3,791	17,808,295	2,143
Germany	T	6,306,497	950	9,579,984	1,158	13,115,308	1,385
United Kingdom	T	2,814,892	433	4,104,905	531	4,606,574	498
Netherlands	T	1,178,360	186	3,032,876	339	2,195,732	273
Chile	T	1,468,654	185	1,118,672	123	2,082,323	190
Austria	T	1,220,381	199	1,714,727	229	1,231,716	119
Denmark	T	663,102	100	460,540	69	878,113	102
France	T	1,019,856	154	1,253,074	249	793,016	84

Source: Global Trade Atlas (GTA)

Table 3: Italy's leading shelled almonds exports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	59,724,549	7,270	102,029,387	9,978	98,899,570	9,047
France	T	11,986,832	1,313	29,280,988	2,937	28,526,552	2,680
Germany	T	17,099,747	2,328	26,836,388	2,767	21,200,920	1,957
United States	T	7,378,810	770	12,407,182	1,019	16,123,705	1,321
United Kingdom	T	5,124,239	641	8,030,960	757	5,784,903	493
Austria	T	630,264	78	3,269,720	364	4,847,793	447
Poland	T	701,137	84	2,556,604	283	3,086,977	505
Belgium	T	2,734,766	255	3,076,381	245	3,063,638	228
Sweden	T	1,249,594	153	2,168,545	202	2,361,979	198
Canada	T	1,251,789	146	2,271,217	202	2,142,860	189
Denmark	T	2,573,837	334	2,429,927	266	2,025,117	196

Source: GTA

Table 4: Italy's leading in-shell almonds imports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	7,676,143	1,434	9,592,440	1,744	12,210,298	1,926
United States	T	3,515,929	761	6,343,894	1,275	6,036,492	938
Spain	T	1,912,075	322	630,834	85	2,398,880	538
France	T	1,114,976	175	1,678,838	224	1,894,372	196
Chile	T	247,389	36	-	-	543,831	70
Germany	T	438,398	60	606,159	77	517,555	55
Australia	T	-	-	-	-	471,226	65
Netherlands	T	-	-	-	-	180,774	36
Turkey	T	-	-	-	-	123,489	22
United Kingdom	T	236,662	48	252,421	57	18,598	1
Romania	T	6,316	1	1,073	-	9,668	2

Source: GTA

Table 5: Italy's leading in-shell almonds exports

Partner Country	Unit	2013	2014	2015
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		USD	Quantity	USD	Quantity	USD	Quantity
World	T	1,980,834	759	1,854,218	544	2,649,387	556
France	T	851,590	329	858,565	234	1,218,709	245
Germany	T	423,639	224	531,044	182	416,537	149
Austria	T	26,490	7	16,681	2	318,829	25
Switzerland	T	139,442	28	49,512	3	298,671	18
Netherlands	T	147,243	81	194,073	72	258,705	105
Czech Republic	T	6	-	8	-	41,074	3
New Zealand	T	-	-	-	-	22,672	2
Malta	T	20,285	2	15,603	2	21,350	2
Sweden	T	5,995	2	7,044	2	9,550	2
Japan	T	-	-	-	-	8,035	1

Source: GTA

II. PISTACHIOS

Table 6: Area (hectares) and Production (metric tons)

Pistachios, In-shell Basis	2014	2015	2016
	Estimates 2014/2015	Estimates 2015/2016	Forecast 2016/2017
	Post Data	Post Data	Post Data
Area Planted	3,546	3,545	3,600
Area Harvested	3,100	3,098	3,146
Beginning stocks	200	200	200
Production	1,000	4,000	200
Ending stocks	200	200	200

Sources: Istat; Industry contacts.

PRODUCTION

Pistachio is a traditional crop in Italy, especially in the Sicily region (Bronte area) which accounts for approximately 90 percent of total supply. In recent years, pistachio production has slightly expanded to other areas in Sicily and Basilicata, where newer and input intensive orchards have been planted.

Bianca (also called *Napoletana*) is the main pistachio variety grown in the country and is normally harvested in September. Since 2004, pistachio from Bronte has been awarded by the European Commission as a PDO (Protected Designation of Origin), distinguishing it from all other pistachio varieties worldwide. Pistachio trees production is cyclical, bearing heavily in alternate years. Therefore, after the extraordinary MY 2015 campaign, MY 2016 will be a 'lower' bearing year.

CONSUMPTION

Italian in-shell pistachios are consumed as a snack food. Bakeries and food companies use shelled pistachios, while ice-cream makers mainly employ milled pistachios.

TRADE

Italian pistachio demand is mainly satisfied by imports from Germany, the United States, Greece, Belgium, and Iran.

Table 7: Italy's leading shelled pistachios imports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	44,639,884	2,923	57,366,541	2,750	61,895,350	3,188
Turkey	T	19,568,730	1,268	11,937,668	545	13,910,821	651
Germany	T	8,687,002	506	15,661,072	718	13,190,981	602
Iran	T	989,837	66	10,302,926	497	12,939,305	721
United States	T	5,989,222	368	11,536,937	598	6,558,307	333
Iceland	T	-	-	-	-	4,678,904	268
Greece	T	1,106,520	119	222,822	11	3,145,969	234
Belgium	T	719,752	67	712,927	34	1,831,944	82
Spain	T	345,226	41	1,261,888	72	1,778,419	109
United Kingdom	T	33,610	3	1,246,400	71	1,291,029	70
Afghanistan	T	-	-	1,495,828	65	801,168	33

Source: GTA

Table 8: Italy's leading shelled pistachios exports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	6,596,879	255	8,595,934	375	7,358,022	269

France	T	1,926,058	80	2,495,209	89	2,051,910	73
United Kingdom	T	1,313,177	64	1,417,614	60	1,465,782	64
Belgium	T	840,249	38	1,216,731	40	1,256,045	42
Japan	T	1,181,698	23	814,506	15	861,634	18
United States	T	15,340	-	33,150	1	498,427	20
Germany	T	771,475	30	1,952,843	149	430,934	19
Romania	T	25,297	1	38,867	1	150,831	6
Sweden	T	132,316	3	81,268	2	90,397	2
Norway	T	72,047	3	94,154	4	77,725	3
Switzerland	T	44,137	1	33,950	1	71,901	2

Source: GTA

Table 9: Italy's leading in-shell pistachios imports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	69,124,221	7,970	71,379,624	7,029	74,736,759	7,412
Germany	T	22,509,483	2,550	30,485,864	2,967	28,979,499	2,914
United States	T	23,311,374	2,494	21,692,930	2,078	20,147,234	1,773
Greece	T	5,117,045	816	1,285,518	225	7,783,865	786
Belgium	T		1,122		801		702

		9,678,796		8,131,984		7,168,923	
Iran	T	93,492	10	2,075,657	206	3,049,542	310
United Kingdom	T	1,070,014	115	1,712,280	181	1,755,400	185
Spain	T	267,194	21	1,039,075	95	1,154,835	117
Luxembourg	T	87,446	10	-	-	1,011,016	170
France	T	3,859,384	492	4,097,437	388	954,888	113
Iceland	T	-	-	-	-	849,542	96

Source: GTA

Table 10: Italy's leading in-shell pistachios exports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	973,530	82	1,022,124	72	1,203,120	101
Luxembourg	T	87,620	10	1,335	-	537,623	51
France	T	2,955	-	88,002	4	232,052	21
Slovenia	T	342,909	34	163,427	13	93,302	8
Japan	T	125,769	3	146,594	3	59,703	1
Croatia	T	32,615	3	113,139	9	55,636	4
United Kingdom	T	33,357	2	57,816	3	35,707	3

Malta	T	47,693	4	55,684	4	35,166	3
Greece	T	-	-	-	-	31,069	3
Romania	T	2,430	-	41,523	3	30,796	2
Austria	T	33,071	3	40,074	2	28,189	2

Source: GTA

III. WALNUTS

Table 11: Area (hectares) and Production (metric tons)

Walnuts, In-shell Basis	2014	2015	2016
	Estimates 2014/2015	Estimates 2015/2016	Forecast 2016/2017
	Post Data	Post Data	Post Data
Area Planted	4,566	4,623	4,625
Area Harvested	4,110	4,160	4,162
Beginning stocks	2,000	2,000	2,000
Production	13,500	12,600	9,850
Ending stocks	2,000	2,000	2,000

Sources: Istat; Industry contacts

PRODUCTION

Italy lost its walnut market leadership a few decades ago and now is a leading importer, mainly from the United States. Since farmers generally grow walnut trees for both timber and nuts, nut yields and quality have suffered. Moreover, higher input costs and lower prices have negatively affected crop profitability.

Most walnuts are cultivated in Campania (Southern Italy), where the main varieties are *Sorrento* and *Malizia*. Farmers in Northern Italy have established efficient and profitable walnut orchards planted with *Lara* and *Chandler* cultivars. Italy's MY 2016 walnut production is preliminarily forecast to decrease to approximately 9,850 MT due to adverse weather. Quality is expected to be excellent and calibers good.

CONSUMPTION

In-shell and shelled walnuts for fresh consumption are mainly purchased during the winter months. However, more consumers are increasingly purchasing walnuts all year round thanks to their perceived nutritional benefits.

TRADE

Italy imports mainly in-shell walnuts (mostly the *Hartley* variety) from the United States until June. Then, walnuts are imported principally from France, South America (Chile and Argentina), and Australia.

Table 12: Italy's leading shelled walnuts imports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	48,357,158	4,557	58,959,281	5,400	56,732,888	5,154
Chile	T	18,935,955	1,542	19,979,984	1,556	22,407,745	1,794
United States	T	11,548,040	1,080	13,057,126	1,103	10,966,760	920
Moldova	T	5,787,269	668	8,736,683	862	6,955,964	728
Romania	T	1,160,180	144	4,962,068	496	3,952,100	439
Ukraine	T	916,844	97	-	-	2,379,649	253
Germany	T	2,040,486	152	1,839,001	135	2,321,613	195
France	T	1,507,738	182	1,959,559	312	2,135,710	308
Netherlands	T	528,199	47	195,902	16	1,885,454	156
Bulgaria	T	1,587,473	199	2,145,671	385	983,040	102
Uzbekistan	T	-	-	338,402	31	942,514	93

Source: GTA

Table 13: Italy's leading shelled walnuts exports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	11,823,216	1,046	13,863,576	1,195	10,646,266	770
United Kingdom	T	4,275,568	339	7,154,031	517	3,832,511	286
Belgium	T	2,179,602	128	2,522,432	137	2,657,936	142
Czech Republic	T	145,784	23	623,414	58	625,168	49
Slovenia	T	641,073	46	434,931	31	470,390	35
Germany	T	1,163,339	133	295,481	26	464,096	43
France	T	810,547	100	122,435	14	316,160	32
Norway	T	288,114	16	331,153	17	293,260	17

Malta	T	195,733	14	295,373	50	281,266	22
Denmark	T	222,541	14	330,282	20	279,591	14
Portugal	T	176,125	24	51,045	5	238,944	26

Source: GTA

Table 14: Italy's leading in-shell walnuts imports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	119,070,305	26,363	156,849,126	32,423	169,974,239	34,374
United States	T	50,083,740	11,755	77,513,383	16,102	78,852,195	15,237
France	T	40,087,130	8,497	33,538,068	7,451	42,564,825	8,582
Chile	T	13,301,787	2,654	20,342,244	3,610	20,627,737	4,107
Argentina	T	7,559,969	1,576	11,661,229	2,288	10,125,441	2,016
Australia	T	4,845,525	1,046	7,683,317	1,560	9,875,697	2,024
Spain	T	1,015,178	231	2,524,974	632	2,353,784	595

Hungary	T	427,000	96	626,647	143	1,071,845	263
Germany	T	188,976	22	1,073,257	190	1,061,646	199
Romania	T	107,779	35	1,071,399	241	977,281	255
Poland	T	-	-	-	-	912,466	744

Source: GTA

Table 15: Italy's leading in-shell walnuts exports

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	T	4,475,400	999	4,629,900	814	4,431,059	795
United Kingdom	T	1,100,593	167	1,889,460	247	2,108,330	299
Austria	T	1,426,734	338	1,155,662	270	1,072,613	219
Chile	T	-	-	172,358	44	239,829	71
Malta	T	198,171	43	324,324	61	169,134	28
Slovenia	T	195,197	35	193,899	34	167,245	29
Germany	T	88,455	22	302,070	57	144,845	33
Sweden	T	73,380	14	71,880	12	125,173	20
Switzerland	T	253,481	12	167,389	19	111,939	13
Algeria	T	-	-	103,881	20	87,311	50
Norway	T	16,545	3	40,176	6	68,200	8

Source: GTA

Abbreviations and Definitions Used in this Report:

MY Marketing Year

Almonds and Pistachios: September/August

Walnuts: October/September

HS Codes:

Almonds: Shelled 080212; In-shell 080211

Pistachios: Shelled 080252; In-shell 080251

Walnuts: Shelled 080232; In-shell 080231

Conversion factor used to convert in-shell to shelled tree nuts:

Almonds: 0.6

Conversion factors used to convert shelled to in-shell tree nuts:

Pistachios: 2.0

Walnuts: 2.34

Ha hectare; 1 ha = 2.471 acres

MT Metric ton = 1,000 kg